DOCUMENT RESUME

ED 254 235 IR 051 037

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TITLE The Teaching of Management as a Subject for the Preparation of Librarians, Documentalists, Archivists and Other Information Specialists.
INSTITUTION United Nations Educational, Scientific and Cultural Organization, Paris (France). General Information Programme.
REPORT NO PGI-84/CONF.801/COL.1; PGI/E.T./HARM-II/4
PUB DATE Oct 84
NOTE 34p.; Paper presented at the International Symposium on Harmonization of Education and Training Programmes in Information Science, Librarianship and Archival Studies (Paris, France, October 8-12, 1984). For related documents, see IR 051 032 and IR 051 037-039.
PUB TYPE Reports - Descriptive (141) -- Speeches/Conference Papers (150)

EDRS PRICE MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS *Administrator Education; Curriculum Development; Developing Nations; Higher Education; Information Centers; *Information Science; Information Scientists; *Information Services; Library Education; *Management Development; Position Papers; *Professional Education; *Professional Training; Public Administration Education

ABSTRACT

This paper examines the area of management training and its importance in developing joint training programs for librarians, documentalists, archivists, and other information specialists. Following introductory materials which provide background and discuss constraints on generalizing management ideas, the paper comprises sections on: basic elements of the management process (planning and innovation, control, organization, staffing, and direction, leadership and motivation); the need for trained managers; management of information organizations in the context of public administration; the paraprofessional level; management education for professionals; training of senior level managers; research on management of information organizations; methods of instruction in management; classroom arrangements; classroom techniques; qualifications of the management instructor; and a summary of suggestions and recommendations. A working paper from an FID/ICA/IFLA Working Party on Education and Training and a seven-page bibliography are appended. (THC)

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PGI/E.T./HARM II/4
Paris, June 1984

UNITED NATIONS EDUCATIONAL,
SCIENTIFIC AND CULTURAL ORGANIZATION

INTERNATIONAL SYMPOSIUM ON HARMONIZATION
OF EDUCATION AND TRAINING PROGRAMMES IN INFORMATION
SCIENCE, LIBRARIANSHIP AND ARCHIVAL STUDIES

Unesco House, Paris, 8-12 October 1984

THE TEACHING OF MANAGEMENT AS A SUBJECT FOR THE PREPARATION OF LIBRARIANS, DOCUMENTALISTS, ARCHIVISTS AND OTHER INFORMATION SPECIALISTS

by P. WASSERMAN

IR051037

General Information Programme and UNISIST

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The material contained in frames at various points in the text has been added by the Secretariat to encourage discussion

BACKGROUND

1. Management is the task of providing direction and leadership to groups engaged in a common enterprise. The teaching of management involves transmitting an understanding of its principles and developing skills for management. For at least ten years discussions of possibilities for developing joint training programmes for librarians, documentalists, archivists and other information specialists have drawn attention to management as an area particularly suited for this treatment.

2. Treating management as a common "harmonized" subject for the various information occupations falls in the pattern of a widely held view of the universal nature of management functions and responsibilities. Management fundamentals -theory, principles and practices- have long been recognized as an ubiquitous need, for application in every kind of enterprise and at virtually every operating level. While much of what has been advanced theoretically, philosophically, and in terms of data-derived principles, stems from the managerial orientation of the more economically developed societies, it has been widely demonstrated that such ideas can improve managerial performance elsewhere. Specific techniques and practices may require adaptation and modification to correspond with varying cultural, social, political, economic, technological and ethical patterns.

3. It would be naive to assume that societal or organizational advances occur without appropriate application of technology, capital and education. Yet important as these may be, managerial know-how is perhaps the most critical element in developmental progress. No amount of capital or technological investment can succed if such resources are inappropriately exploited through lack of fundamental understanding of management principles. Ineffectual management leads to inefficient use of human and material resources. A clear correlation exists between societal development and growth, and the level of managerial expertise. As long ago as 1965 it was stated :

> We view management as the single most critical activity in connection with economic progress. Physical, financial, and manpower resources are by themselves but passive agents ; they must be effectively combined and coordinated through sound, active management if a country is to experience a substantial level of economic growth and development. A country can have sizable natural and manpower resources including plentiful skilled labor and substantial capital but still be relatively poor because very few competent managers are available to put these resources efficiently together in the production and distribution of useful goods and services. (1)

4. Few contemporary scholars consider management to be culturally limited. No persuasive evidence suggests that management skills are not transferable. Still the constraints or variations in a given setting do influence management performance and application.

Constraints in Generalizing Management Ideas

5. Major educational constraints to universal transferability of management concepts and processes relate to literacy levels and the degree to which existing educational levels match requirements in the workplace. Sociological/cultural constraints may influence the prevalent views in a given culture of relationships between authority and subordinates-attitudes concerning paternalism, subordinate participation, etc. The degree of workplace co-operation between different groups may vary due to the influence on behavior in different societies, of prevailing views on social levels and structure. Perspectives on achievement and work, individual mobility, views of wealth and material gain, cultural attitudes toward risk taking and views of change, will all frequently be linked with the existing social, cultural and religious values.

6. Political and legal constraints restricting management options exist everywhere and vary profoundly from one to another setting. Stability or rigidity of organizational arrangements, regulatory codes, and other mandated requirements often influence management performance. Unsettled environmental conditions bear powerfully upon planning prospects. Economic constraints are self-evident. Without the minimum resources required and some measure of continuing economic stability, managerial performance is inevitably handicapped.

7. In spite of the difficulties encountered in the application of management principles and practices, persuasive evidence based on research suggest that the fundamentals of management can be effectively applied under greatly varying cultural conditions. If this is true for the management of organizations in general, it is also true for information organizations.To show how germane management issues are to libraries, documentation centers and archives, it may be helpful to identify the salient elements.

BASIC ELEMENTS OF THE MANAGEMENT PROCESS (2)

8. Planning and Innovation

(a) Formulation of basic organizational objectives : Purposes of the organization and specification of its methods of operation.
(b) Determining types of plans utilized : Plans and decisions ; plans and forecasts ; plans, standards and goals ; components of a plan.
(c) Establishment of time spans for plans and planning : Preparation time ; lead time ; plan implementation ; long range planning.
(d) Pre-programming : Extent to which operations are set out in plans.
(e) Degree of flexibility : in terms of the objective of the plan, the plan as a unit, the plan components.
(f) Determining planning methodology, techniques and tools : Selection and evaluation of alternatives ; data collection and processing ; relationship of testing to planning.

(g) Providing for employee participation in planning : Use of committees for co-ordination, investigation, advice, communication ; their advantages and disadvantages ; specialist involvement in idea origination, selling the plan, organizing the planning, evaluating data, implementation ; pros and cons of specialist involvement.
(h) Application of scientific method : Degree to which scientific method is applied by managers and others in dealing with problems.
(i) Handling innovation and risk taking : Nature and extent of innovation and risk taking in operations ; degree of difficulty of introducing change.

9. Control

(a) Establishing performance and control standards : For application in areas like personnel, finance, production, marketing.
(b) Determining control techniques : Financial analysis ; standard cost analysis ; quality control.
(c) Arranging for feedback : Nature and structure of information feedback systems.
(d) Planning corrective action : Timing and procedures employed.
(e) Organizing staff control : Degree of tightness of control ; implications, extent and nature of controls.
(f) Measuring control : effectiveness of the control system in determining events.

10. Organization

(a) Considering organization size : Scale of operations of representative organization and its major subunits ; economies and wastefulness of scale.
(b) Determining centralization and decentralization : Degree to which authority is concentrated or dispersed ; delegation of authority.
(c) Arranging work specialization : Degree of division of labor ; bases for specialized activities.
(d) Deciding on spans of control : Wide versus narrow spans -advantages and disadvantages.
(e) Division into departments : Reasons for grouping activities ; extent and uses of service departments.
(f) Determining staff generalists and specialists : Usefulness ; line and staff relationships.
(g) Arranging for functional authority : Limits of functional authority ; unity of command in relation to functional authority.
(h) Measuring authority and responsibility : Extent of confusion and friction regarding authority and responsibility relationships.
(i) Decision making structure : Use of committees and groups in decision making.
(g) Measuring organizational flexibility : Extent to which the organization is mechanical or flexible with regard to changing conditions.

11. Staffing

(a) Recruitement : Principles and methods used in recruiting personnel ; selection techniques -interviewing ; testing.
(b) Promotion of staff : Criteria used in selecting and promotion ; promotion from within versus hiring from outside.
(c) Performance appraisal : Techniques and criteria.
(d) Job descriptions : Nature and uses in selection ; in evaluation ; in determining wage rates.
(e) Compensation schemes : Levels of compensation by type of work performed ; other forms of incentives.
(f) Training programmes : Nature and extent of internal training activities.
(g) Staff development : Extent of informal and formal planning for individual development ; motivation and inducements.
(h) Employment security : Policies and procedures regarding seniority, reduced hours, possibility of dismissing personnel.
(i) Attracting new talent : Strategies for obtaining personnel at various levels with desired skills or abilities.

12. Direction, Leadership and Motivation

(a) Patterns of leadership : Degree and extent of authoritarian versus participatory management.
(b) Motivation of staff : Techniques and methods employed for motivating managerial and non-managerial personnel.
(c) Supervisory methods : Dealing with people and encouraging co-operation ; improving morale ; disciplinary strategies ; work safety procedures ; training employees ; simplifying work methods.
(d) Communication methods : Patterns of upward communication ; management information sharing ; written versus oral messages ; interpersonal relations.
(e) Motivation of Personnel : Motivating personnel to perform efficiently and to improve performance and abilities.
(f) Organizational compatibility : Degree of identification between the interests and objectives of individuals, work groups, departments, and the enterprise as a whole.
(g) Organizational climate : Extent of trust and co-operation or conflict and distrust among personnel at all levels.
(h) Measures of disaffection : Degree of frustration, absenteeism and turnover among staff.
(i) Non-productivity level : Degree and extent of wasted time and effort, resulting from restrictive work practices, unproductive bargaining conflicts, etc.

THE NEED FOR TRAINED MANAGERS

13. There is a compelling need for a qualified managerial cadre to provide effective stewardship as the world's libraries, documentation centres and archives grow in size and in technological complexity. But management capability is not required solely of those who occupy high places. Virtually every professional practitioner functions as a supervisor of the work of others. Every inventory of needed skills in the information workplace shows management high on the list of requirements. Still, our practice is years ahead of our thought. Abundant evidence demonstrates how limited has been the formal and intellectual preparation of occupants of managerial roles in all three of the information occupations.

14. In information work some individuals occupy high managerial posts as a consequence of lateral transfers from other disciplines. Examples are the academic who is appointed to a research library directorship, the scientist who becomes chief of an information or documentation centre, or the historian selected to lead an archival organization. Such nominees are frequently thoroughly experienced in their specialities and endowed with sound intellect, but may well not be schooled in managerial theory or practice.

15. In the more typical case of advancement within the occupation, staff members normally begin their work as technical officers and it is for such roles that their educational preparation has best equipped them. Thus, at the earliest career stage individuals perform as reference librarians, catalogers, documentalists, archival assistants, etc. But with successful performance these professional staff members are advanced to more senior levels of responsibility. They become, first, supervisors and, after continued career success, are advanced to roles of more senior managerial responsibility. Only uncommonly does this metamorphosis occur with any preparation beyond the experience of the workplace. There is unfortunately no necessary correlation between successful technical performance, and successful managerial performance. In the absence of supplementary formal or informal education or training, managerial posts may often be filled by those unprepared or unsuited to the role.

16. While it is easy to demonstrate the common managerial requirements for all branches of the profession, in practice we have seemed to insist upon the differences, and been unwilling to seek generalizations and commonalities. Management courses for librarians, archivists and other information personnel have accented formal and structural approaches rather than the behavioral. Examination of a sampling of the management courses now offered in professional programmes (3) reveals that these tend to center upon description and explanation of activities, the legal bases of information organizations, structural arrangements, public relations, and other elements of a non-technical nature not covered elsewhere in the information curriculum. Yet it is the behavioral elements which form the common themes which cut across every type of management arrangement, clearly including those of information systems and services in all branches of the information profession.

Must librarians, documentation specialists and archivists be managers ? What should courses in management be designed to accomplish ?

What are developments in the information field which could require the introduction or improvement of training in management for information personnel ? Impact of new technology ? Changes in data protection and flow ? Increased interaction between public and private sectors in certain cultures ? Growth of information systems and networks ?

What is likely to emerge as the role and importance of management studies in the long term ? Is it possible to fashion programmes now to assist future generations of information workers to cope with probable changes ?

MANAGEMENT OF INFORMATION ORGANIZATIONS IN THE CONTEXT OF PUBLIC ADMINISTRATION

17. We have seen that management concerns are common to all organizations and that problems, issues and approaches developed in one type of institutional environment may be relevant to other settings. In many ways, management in information organizations can be seen as an extension of public administration. There have traditionally been two major avenues by which to study public administration.

18. The first has been the so-called "organization" or "programme" approach, in which management is viewed from the point of view of a specific functioning unit -police, prison, hospital. In this approach, the usual managerial problems -organization structure, personnel, budget, etc.- are treated only in part as the management process and focussed primarily upon the specific tasks and functions carried out by particular agencies or types of agencies. There is, thus, archives administration, library administration, the administration of documentation centres, etc. This approach follows the theory that management cannot be studied meaningfully apart from the study of the specific programme to be administered, that managers manage something, and that this "something" strongly influences the manner of performance.

19. The second more contemporary approach adopts a more universal concept of management -the "process"approach. In this view there are certain managerial processes at work in any type of programme. These include planning, programming, organizing, directing, co-ordinating, reporting and appraising. These processes are sufficiently similar from programme to programme to justify special study of the process itself. Those who speak most authoritatively for public administration in the modern world, generally regard management instruction as closely tied to process, while recognizing that management does not take place in a vacuum . Thus, while curricula offer concentrations in

specialized fields of practice -i.e., police administration, city management, etc.- management courses center upon managerial processes.

20. It seems clear that the comparative approach to management as applied in public administration is equally valid for management in information work. Moreover, a focus upon the common processes of organizations, rather than upon the differences establishes the logic for a harmonized and common course. Differences may exist, but are susceptible of consideration as particular cases or applications. Just as comparative courses in management of libraries point out distinctions in the character and programmes of public, school and research libraries, so might a harmonized course in management of information work similarly appreciate the variations among libraries, information systems and archives.

21. Once the proposition that instruction in management is a requisite for effective performance in the information professions has been accepted, there is still the need to differentiate among practitioners operating at different levels of responsibility and for their preparation at different levels.

What are the important distinctions between types of services that need to be kept in mind in designing a harmonized course?

What is the relationship to what precedes of the concept of "systems" composed of inter-related components with a common goal -including libraries, information centres and archives ? Common components are : information resources (documents, data bases, archival records, etc.), human resources (personnel), financing, physical facilities (buildings, equipment, etc.). To what extent are management principles and techniques common to these components ?

THE PARAPROFESSIONAL LEVEL

22. Since the burdens of supervisory responsibility are so ubiquitous in complex modern organizations, it is not uncommon for paraprofessionals in information work to supervise the work of others. For the paraprofessional, the most suitable mechanism for instruction in the requisites of supervision might be in-service or on-the-job training. Sometimes in the larger organizations, the training responsibility can be carried out by a training department. But more typically it will be the task of the information manager to instruct the paraprofessional. In organizing orientation training for supervisory tasks the effective manager will successively inform the paraprofessional why the job is important, will demonstrate how the job should be done, will let the staff member try it, first under guidance, and will gradually increase the amount of independence.

23. Perhaps the single most effective mechanism for paraprofessional training in management skills is the example provided by the manager. The crucial ingredient of in-service training in management is demonstration in which the managerial performance comes to be seen as the standard or preferred method. When paraprofesisonals demonstrate by temperament, application and performance, readiness to assume a broader role, it may well be time to encourage them to undertake professional education.

MANAGEMENT EDUCATION FOR PROFESSIONALS

24. Determining the content of professional education is a difficult task. For, as Saunders suggests, "it is not easy to write in general terms about levels of programmes, since the structure of the educational system in different parts of the world varies considerably and results in different types of higher educational institutions and different designations for the qualifications which they award." (4).

25. While there would be differences between course content at the main professional level and the highest professional or managerial level, some management instruction is required at every level.

26. The usual pattern for management offerings in academic programmes preparing information personnel is to offer one required or recommended course for all students. Teaching arrangements vary. Sometimes the course is offered in a single semester, sometimes over an academic year. In some instances, more advanced courses are offered, either within the curriculum of the information faculty or as electives in other faculties or professional schools such as public administration or business administration.

27. A somewhat related new speciality in what is sometimes referred to as Information Resources Management, is beginning to receive attention in Australia, the U.S.A. and the United Kingdom, and has been formalized in at least one North American library school -Syracuse University. In Luxembourg there was established recently the European Institute of Information Management in response to demand in the European Community. At Syracuse, the master's degree offering builds on four required courses -information systems analysis, foundations of information science, concepts of information resources and management principles. The programme then requires students to pursue two courses from each of the distinct tracks. In the management track the course choices include : records management, behavior of users, a seminar in management principles for information services, information processing for managers, evaluation of information systems, and economics of information. The term management is used here to connote a very wide range of subject matter and differs fundamentally from the type of material treated in this paper which concentrates basically upon the behavioral and organizational aspects of management.

28. At a joint meeting of members of the education and training committees from FID, ICA and IFLA held in Vienna in August 1983 (see Appendix A), there was extensive discussion of an unpublished paper by Professor Evans of the Graduate School of Librarianship and Information Management, University of Denver which sought to determine if a "core" of management concepts existed that could be identified as common for all information professionals, regardless of specialization.

29. The group identified the nineteen topics which follow and which had been identified in a study of textbooks on management as ones which could be considered "core" for professional education. Each concept was defined in "non-cultural" terms in an attempt to show its universality. The definitions used here are almost entirely those agreed upon at the meeting.

Theory

(a) **Authority**/accountability : consideration of the set of rights granted to an individual by another individual or a group of individuals, and being held answerable for the results of having excercized the rights of authority.
(b) Communication : the transfer of information from the sender to the receiver, with the information being understood by both the sender and receiver.
(c) Creativity/change/innovation : the process of developing new ideas and approaches to problems or modifications in the organization's environment.
(d) Decision-making : the selection of one course of action from two or more alternative courses of action.
(e) Delegation/organizing : the process of establishing an intentional structure of roles for people in an organization to fill, and assigning to each role a fixed amount of authority and responsibility for carrying out the prescribed roles.
(f) Ethical/legal issues : dealing with personal conduct, moral duty, and concerns with human relations with respect to right and wrong ; legislative and regulatory bases governing work in the organization.
(g) History/styles : the review of history of management and description of styles or approaches to the subject.
(h) Human behaviour : the basic elements of human growth, development, learning and psychology.
(i) Leadership : the relationship in which one person influences others to work willingly on one or more related tasks to achieve a goal the influencing person desires.
(j) Motivation : the entire class of human drives, desires, needs, wishes and similar forces which causes, channels and sustains people's behaviour.
(k) Planning : the process of selecting existing facts from the environment and making assumptions about the future for the purpose of setting a course of action for the organization to take in order to achieve desired ends.

Practice

(a) Accounting : the process involved in making a financial record of business transactions and the preparation of statements concerning assets, liabilities and the operating results of an organization.
(b) Budgeting : the plan of action concerning income and outgo stated in terms of money, people, time or equipment.
(c) Control/evaluation : determining what is and is not being accomplished, evaluating performance and, when necessary, having corrective steps taken so that performance conforms to established plans.
(d) Management information systems : the mechanisms for rationalizing managerial control and performance through systematic processes and the use of these systems to secure needed data for management activities.
(e) Marketing : the study of characteristics and needs of clients and potential clients through market research techniques and the use of marketing strategies.
(f) Production/operations (physical plant, security, files and records, etc.) : the group of activities whose functions are to transform a set of inputs to the organization into desired outputs ; designing and monitoring efficient production systems.
(f) Quantitative methods : the set of techniques designed to assist in decision making, planning and controlling (including management science, operations research).
(g) Staffing : the process of filling and keeping filled, the position (roles) provided for in order that the organization has the human resources needed to carry out the required work.

30. The preceding list does not specify the length or academic characteristics of the course or courses in which such content areas would be dealt with.

31. Countries offering professional education at several levels may wish to stress in management education at the first level et least a basic understanding of the following areas, perhaps those most likely to be required by beginning professional staff working at lower levels :

Human relations skills ; delegating authority ; gaining co-operation from staff members ; maintaining staff morale ; establishing discipline ; dealing with conflict.

Training subordinates effectively ; simplifying and improving work methods.

Principles and techniques of supervision ; developing staff participation and employee motivation.

Organizational structure ; principles of organization.

Appraising and evaluating staff performance ; guidance of personnel.

Planning work schedules ; fundamentals of time study ; operations analysis.

To what extent should the meeting give attention to the view that management in the information field should be regarded as "Management of Resources" -human, budgetary, physical facilities (buildings, equipments, etc.)- applied to the operation of institutions including libraries, information centres, archives, etc ? Could a common core of principles and courses be identified in this context ?

Developing countries have frequently stressed the need for increased emphasis in management education courses on Financial Management and Management of Modern Technology. Are these needs now being sufficiently reflected to meet this need ?

How much place in the curriculum should be allocated to management studies ? To what extent is this provision already made in existing programmes ? What are the obstacles to introducing or extending such programmes ?

To what extent could the core suggested in the paper be applied constructively to combine teaching for the traditional branches of the information field ? To what extent is this a practical approach ?

TRAINING OF SENIOR LEVEL MANAGERS

32. It is at the highest level where specialized knowledge is required by those occupying or soon to occupy senior management positions in information organizations, that there has been the most experience at the international level. (5)

33. UNESCO Experiences

A two-week programme, adapted from the Library Administrators Development Programme offered annually, since 1967, at the University of Maryland, has been sponsored by Unesco for library and information administrators in different parts of the world. This experience could readily be adapted to cover the concerns of all three branches of the information discipline.

34. These courses stressed the universality of the managerial process. They were designed for the practicing information person who had not formally studied management, but had been assigned managerial tasks. They accented the behavioral and human aspects of management. Because of the strategic importance of financial and budgetary matters, these too were prominently treated. In response to new conceptual and operational requirements within the information field, additional topics were added. These included information marketing and market research, political relationships associated with networks and governmental infrastructures, and the impact of technology upon the management of information organizations.

35. Such seminars have combined theoretical elements and conceptual issues with the application of techniques and skills. They have helped participants identify solutions to their organizational problems, and evolve heightened awareness of their responsibilities and the managerial implications of their positions.

36. Instructional methods have been varied and after-hour discussions have helped relate the programme to individual needs. Such workshops should take place outside the usual work environment in an ambience conducive to study, reflection and discussion.

37. Such programmes must utilize at least some faculty from the region. In this connection, it is important to identify instructors who have worked in this kind of setting and not solely in the more formal classroom atmosphere.

38. It might be instructive, as one harmonization option, to organize in one region a course for managers drawn from all three of the information professions. Individuals who completed the course could use the knowledge gained in their own organizations and in their own countries to broadcast the managerial lessons learned more widely.

39. The topical outline given below would require adaptation to fit regional requirements, but the content certainly represents some of the most needed elements :

FIRST WEEK (6)

	Morning	Afternoon
First day	The Role of the Administrator in Complex Organizations	Establishing, Analyzing, and Implementing Objectives
Second day	Establishing, Analyzing, and Implementing Objectives	Organization Structure: Design and Dynamics
Third day	Managerial Leadership and Interpersonal Effectiveness	Managerial Leadership and Interpersonal Effectiveness
Fourth day	Motivation: Management for Productivity and Satisfaction	Marketing and Market Research as Administrative Tools
Fifth day	Financial Planning and Budgeting Control	Financial Planning and Budgeting Control

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SECOND WEEK

	Morning	Afternoon
First day	Performance Appraisal and Development of Staff	Problems in Performance Appraisal
Second day	Group Problem Solving and Discussion Leadership	Political, Network, and Socio-Economic Structure
Third day	Managerial Decision-Making	Managerial Decision-Making
Fourth day	Change Processes: Impact of Technology on Information Organizations	Trends and New Directions in Administration of Information Organizations
Fifth day	Workshop and Open Forum	Workshop and Open Forum

40. In-Service Development Training

Forward-looking organizations recognize the need to prepare staff members for enhanced managerial responsibility. Such a tactice insures the methodical grooming of individuals for filling senior roles. In some instances those being prepared learn from their supervisors through daily contact. Another mechanism brings together a group of individuals viewed as likely prospects for advancement for regular sessions of orientation and instruction. Only larger organizations would be able to offer such opportunities. Sometimes outside instructors or trainers are brought in to help review particular issues. This technique can sometimes provide insight into problems and opportunities facing the organization.

41. Professional Organizations'Sponsorship of Courses

Information managers, like other professionals have a continuing need for exposure to new techniques and methods. Professional organizations at the national, regional and international levels can assist by convening seminars and institutes focused upon the particular themes needed by their memberships. The management area is one which clearly requires such efforts.

42. Management Courses in Business or Public Administration

In many professions a frequently used device for improving the skills of potential and practicing managers is to encourage their enrolment in the programmes in business administration or public administration offered by academic institutions. Trainees pursue either a formal course leading to an academic diploma or degree or elect specific courses considered particularly relevant to the needs of their organizations. Courses in management might be supplemented with courses in accounting, finance, marketing or personnel. Such study tends to broaden the managerial understanding and capacity of the student.

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However, it is time-consuming and expensive and the courses may not be directly focused on problems and issues facing managers of information organizations. The search for bridges from the business or public administration environment to that of the information organization is the responsibility of the student rather than the instructor. Moreover, the utility of particular substantive areas for information managers frequently only becomes apparent after students have already had some instruction in the context of information organizations. Forward-looking information organizations should encourage their supervisory cadre to take advanced coursework in management.

43. Management Internship

A mechanism employed in at least one industrialized country is to arrange for selected interns to learn about the responsibilities of senior level information organization managers by observing their performance. Since the early 1970's the Council of Library Resources in Washington, D.C., has sponsored a programme which helps prepare younger managers for work in large research libraries. Each competitively selected candidate works closely for one year with the director and top administrative staff of an academic library chosen for its administrative excellence. The intern is exposed to the ways a large academic library deals with the full array of problems that arise each day. Interns follow a programme of observation, reading and practical assignments. This pattern might be extended to other types of information institutions and other countries and might deserve supportive funding under a grants programme.

Is the growing complexity of information systems and networks creating a need for new approaches and initiatives for preparing administrators with high-level managerial skills ?

RESEARCH ON MANAGEMENT OF INFORMATION ORGANIZATIONS

44. A necessary accompaniment of instruction is research, and the field of management in the information discipline is an area where study is badly needed. Until recently, management of information systems and services was viewed as a requisite, perhaps, but one which could be dealt with intuitively, the preponderance of instructional materials being drawn from the literature of management of business or public enterprises. There has as yet been only limited testing of general managerial hypotheses in the information context. The management of different kinds of information organizations represents, then, a fertile field for comparative research as does that of information institutions with businesses and with public organizations. Additional research is required to clarify such matters as legislative and financial constraints on information management. It would seem wise to consider a harmonized approach to such inquiry in parallel with efforts toward harmonization in education and training. The results of research would not only enrich the content of education in the management of information organizations, but also provide an improved conceptual framework for management practitioners.

METHODS OF INSTRUCTION IN MANAGEMENT

45. The means used for instruction in management vary widely from on-the-job experience and rotation of work assignments, to specialized workshops focused upon specific topics such as cost control. The choice sometimes relates to whether instruction is informal or academic and to the amount of time available. What follows suggests the range of options open to instructors for courses in management theory and practice.

46. Informal studies suggest that perhaps 95 percent of adult training is done in the classroom using traditional lecture methods (7). The simplicity of making arrangements and habit are doubtless key factors. While the lecture method is simple, uncomplicated, and inexpensive, it may not always be the most effective. The teacher knows the subject - the learners do not, and so the instructor tells the class what he knows. However when used creatively by an effective instructor it can stimulate interaction and produce feedback. Ideally, the learner should have received notes including a statement of learning objectives in advance.

47. There are many alternatives to the conventional classroom lecture format. Even in formal academic programs, group methods built on the dynamics of learning may be used. Such methods include group discussion, seminars, workshops and related forms. Under the guidance of trained leaders, these provide full opportunity for individual participants to express opinions and share ideas and experience.

48. The case method first developed in legal education, develops independent thinking based upon the examination of actual or simulated organizational problems. The individual, in studying the case report seeks its meanings and general relevance. The discussion of the case helps the students learn diagnostic techniques, and enhances skills in problem definition, identifying obstacles to remedial action and proposing solutions.

49. Role playing is employed for training in the human relations skills of management and finds widest application in such areas as interviewing, grievance handling, group problem solving, performance review, conference leadership and decision making. It is a technique which offers an opportunity for practicing skills in doing and implementing. In recent years, the method has been enhanced by videotaping and playback as important elements in review and critique of performance.

50. Programmed instruction, as the term is most commonly used, denotes a product (instructional package) having a highly structures (programmed) sequence of instructional units with frequent opportunities for the learner to respond to problems or questions, typically accompanied by immediate feedback. Using this method; the instructor's role is to select and provide the appropriate materials, arrange for space and schedule, provide individual tutorials as needed and sometimes administer or evaluate final examinations. Programmed instruction is most effective when used with seriously motivated students and in dealing with : widely-scatered students ; large numbers of students ; stable subject matter ; requirements for standardized performance ; small numbers needing training in a particular subject. A modern day adaptation of programmed instruction is computer-aided instruction. This involves hardware, software (compatible programme), and courseware (instructional materials). Computer-aided instruction allows interaction between the presentation device and the trainee. The rapid updating of obsolete material, a problem with other forms of programmed learning is relatively easy, as is the preparation of individualized assignments.

51. Gaming and simulation. A game is an activity undertaken by a player or players whose actions are controlled by a set of rules and by a pre-determined end point. Simulations differ from ordinary games in that their elements represent an external reality. Poker, for example, is an ordinary game in that it is not a model of some other, non-game activity. Monopoly, on the other hand, is a simulation of the real estate business, albeit a poor one. In a gaming simulation, the players act within and upon a simulation and see feedback from it which affects the game activity. Gaming simulations incorporate a set of roles, a scenario and an accounting system. Among the categories of management games are : general-systems games ; group-interaction games ; resource-allocation games ; budget-allocation games ; influence-power-allocation games ; communication games . The use of gaming simulations provides a systematic method of exploring issues. Learners encounter an experimental situation

in a risk-free environment and develop empathy for real-life decision makers.

52. Many audio-visual media can be exploited in management education depending upon objectives, the target audience, and the instructional strategies, cost and time. There is no best medium. A good film is better than a poor lecture and a well written article may be better than a mediocre filmstrip. Use of a mix of media tends to stimulate attention and interest. The best medium for a particular use is simply the cheapest and simplest one for achieving the instructional objective. Among widely available audio-visual devices for instruction in management are: 16mm film motion pictures. There is a large and growing library of films in the management training field. Filmstrips,often accompanied by a sound track, provide an alternative when the expense of producing motion pictures is prohibitive.

Slides are a basic tool in audio-visual instruction. Slide/tape presentations are becoming more and more popular and are suitable for various aspects of management instruction. Overhead transparencies are easy to make and use and require only simple equipment.

Video : the potential applications of video technology are limitless. Videotape is valuable as a training device because of its instant reply capability. It is useful in time and motion study and for reviewing performance in role playing exercises.

53. The more traditional media such as chalk boards, flip-charts and slap boards are also widely used in management instruction.

CLASSROOM ARRANGEMENTS

54. The physical aspects of the classroom may influence learner involvement and success in management training. A number of seating patterns have been used.

55. In the traditional arrangement students sit in rows facing the front of the room. This is efficient as far as space use is concerned, but is essentially teacher-oriented. When interactions do occur they are likely to be between the teacher and individual students. Clearly the chevron,circle, U-, and V-shaped arrangements are less efficient in use of space and are not likely to be employed with large groups. But these patterns do encourage more student participation and interchange. The conspicuousness of the instructor is reduced considerably but with a U shape,for example, the instructor can immediately regain attention by simply stepping into the U.

56. Students gathered around tables in small groups form an even more learner-centered situation. The teacher will find it harder to regain the center of attention, when students are engaged in discussions. One device for regaining control in this situation is to have the groups report to the full class. When the groups finish the instructor can resume the planned programme.

CLASSROOM TECHNIQUES

57. In management instruction, it is necessary to exploit basic techniques for successful teaching :

(a) Involvement : Since no one ever learns much without being involved, it is important to involve learners to the greatest extent possible. This can be achieved by having small groups work together on a common problem. Individual learners may also work on such problems separately. To assume that learners are involved with no concrete evidence of this is always hazardous. Only when students have reacted orally or by doing something can the instructor be certain of the extent of their involvement.

(b) Accountability : Since learning is an individual activity, students need to be made aware that they are responsible for learning. Whether for a small group activity, homework, or outside reading, learners must feel an obligation to reach the learning goal in the assignment. The instructor needs to plan activities encouraging learners to assume responsibility for learning -thus the term accountability. Instructors often over-protect learners by accepting the accountability for learning themselves. The successful instructor presents enough information to allow students to reach the conclusions on their own.

(c) Feedback is that which allows the instructor to know what the learner has absorbed. Feedback is obtained in many ways. Sometimes instructors depend upon the faces of the learners. If the students look pleased or satisfied, if they nod their heads positively, some instructors interpret this as meaning that things are going well. However, this is uncertain. Measuring the success of the discussion method in a particular instance, for example, involves the amount of talking done by the students and the number of students doing the talking. Are all the students offering feedback, or just one or two ? Any instructor can evaluate the methods used by examining the results with respect to involvement, accountability and feedback. These are a surer measure of a particular method than whether the instructor feels comfortable with it or even whether the students like it.

QUALIFICATIONS OF THE MANAGEMENT INSTRUCTOR

58. Underlying the issue of developing appropriate education for management in the information professions is the question of who is best equipped to teach such courses. Some would reason that management cannot be taught by those who have never been successful managers. Still, even if some have managed or may be managing information organizations with notable success, they may, themselves, have contributed little to furthering the understanding and development of management theories or principles. This may suggest entrusting the instructional role to those who have demonstrated their capacity in scholarship and research in management of one or another form of information organization. This rationale is well expressed in the following passage taken from a work in another field. (8)

> The practitioner, both by equipment and by temperament, is geared to action and the scientist to explanation. The practitioner's action is not random, or irrational, however. It is based on a kind of wisdom and experience which can best be described as clinical acumen. Clinical acumen is not something mystical. It is compounded of partly conscious, partly unconscious, knowledge and facts which form the basis for a rational judgment. One procedure for developing a more scientific base for welfare practice, I believe, will be the identification and explication of the elements that enter into clinical acumen.

Further and more specifically,

> The formulation of practitioner knowledge into testable propositions calls for a kind of competence not possessed by most practitioners. It calls for the kind of analytical, generalizing ability and interests possessed by scientists whose major concern is with analysis and generalization.

Instructional responsibility for management courses in business and in public administration is regularly assigned to scholars and professors rather than corporate managers or government officials. The perfect management instructor would combine the analytical detachment and theoretical insight of the scholar, with pragmatic know-how of the seasoned manager, but such capacities are only uncommonly found in the same individual. One method sometimes employed to blend theory and practice is team teaching. But this may be prohibitively costly.

59. Related is the issue of whether the management instructor should be drawn from the information discipline or whether a professor of business management might offer this instruction. To the extent that the course or courses center upon the management process, might the latter not be a sound alternative ? The principal difficulty is the need for the instructor to relate the course to a particular type of organization -the information organization. Without some knowledge of information work, such an instructor would have difficulty in relating the management principles, theories and practices to the specific requirements and environment of the learners. Here again, except for the financial burden, team teaching using both a business management instructor and an information management specialist, might well yield the best results.

Does failure to identify appropriate teachers impede the introduction of courses in management ?

Are there steps which could be taken to contribute to a solution of this problem ?

SUMMARY OF SUGGESTIONS AND RECOMMENDATIONS

60. This paper provided a rationale for instruction in management for the information professions which borrows from the established fields of business and public administration and applies these theories and principles to the study of management by information workers. It reasons that harmonization of management education in the three branches of the information field is a logical extrapolation from the comparative study of management, which, in its focus upon behavioral processes, is highly applicable to information organizations. Some of the proposals advanced for discussion are the following :

(a) Understanding of management fundamentals -theory, principles and practices- is needed by managers in all three branches of information work and constitutes a subject for harmonized instruction.

(b) While recognizing that cultural adaptation is required, the similarities of managerial problems in different regional and environmental settings outweigh the differences, and reinforce the value of a comparative approach in harmonized study.

(c) Needs for managerial preparation differ, depending upon the level of organizational roles and responsibilities of information workers.

(d) Paraprofessional training in management is best achieved on the job and in the workplace.

(e) Some elements of management preparation are needed by all information professionals. Basic management skills topics must be covered even by those at the lowest professional levels. Additional specialized knowledge is required for effective managerial performance by those holding senior level and managerial posts.

(f) Specific topical areas, drawn from the recommendations of the Vienna workshop, which might serve as the basis for planning course content of professional education in a harmonized approach to management study for all three branches are put forward.

(g) A framework for a two-week advanced workshop based upon earlier international experience and suited harmonized instruction for senior managers of all three occupations is suggested.

(h) There is a need for comparative research in management issues germane to all three branches of the information discipline.

(i) Management instruction methods should draw upon a wide range of pedagogic approaches and arrangements.

24 (j) Appropriate qualifications for the management instructor are crucial to effective learning.

NOTES AND REFERENCES

1. Richard M. Farmer and B.M. Richman, Comparative Management and Economic Progress. Richard Irwin, 1966, p.1.

2. Adapted from Farmer and Richman, op cit.

3. Based upon a review of course outlines for courses in management contained in the Clearinghouse on Information Education and Training Materials maintained since 1983 at the Syracuse University School of Information Studies under a contract between UNESCO and FID and carried out by the Education and Training Committee of FID in co-operation with IFLA and ICA.

4. Guidelines for Curriculum Development in Information Studies, prepared by W.L. Saunders. Paris, 1978. (PGI-78/WS/27), p. 17.

5. Paul Wasserman, "Review of International and Regional Programmes in Training Managers for the Information Profession", prepared for the IFLA/FID/ICA Workshop, Vienna, Austria, August 17-18, 1983, Education for Information, vol. 2 (1984), p. 3-18.

6. A Course in Administration for Managers of Information Services : Design, Implementation, Topical Outline.Prepared by Paul Wasserman and John Rizzo. Paris, UNESCO, 1976 (SC/76/WS/110).

7. Martin M. Broadwell, "Classroom Instruction". Training and Development Handbook, 2nd ed. McGraw-Hill, New York, p.31-33.

8. David G. French, "The utilization of the social sciences in solving welfare problems". In Social Work Practice in the Field of Tuberculosis (Symposium Proceedings, July 27-August 1, 1953, University of Pittsburgh, School of Social Work, 1954, p.29).

APPENDIX A

FID/ICA/IFLA WORKING PARTY ON EDUCATION AND TRAINING

WORKING PAPER

The FID/ICA/IFLA workshop held in Vienna August 17 and 18 1983 thinks that it is possible and desirable to identify areas of common interest in the teaching of management for the information professions.

The participants at the workshop believe that now is the time for FID/ICA/IFLA to join forces in working toward an integrated approach to education and training. Furthermore, education and training programmes based on a common core of management topics may be considered a first important step toward a more united effort from these professions in making their communities aware of the role that archivists, information specialists and librarians play in preserving and providing access to the country's information resources and intellectual heritage.

The workshop sees management for the information professions as being concerned with the following topics which have been divided into two groups - theory and practice.

THEORY	PRACTICE
authority/accountability	accounting
communication	budgeting
creativity/change/innovation	control/evaluation
decision-making	management information systems
delegation	marketing
ethical/legal/political	production and operations (physical plant, security, files and records, etc.)
history/styles	quantitative methods
human behaviour	staffing
leadership	
motivation	
planning	

The topics were identified on the basis of their treatment in current management textbooks.

One method of incorporating the above topics at the institutional level is to consider offering an introductory course that would bring students from the different backgrounds to a common conceptual understanding. The course would include basics of the systems approach, a way of holistic thinking and outlook in addition to the elements of systems analysis. This introductory course would help translate individual approaches to mutually supportive thinking. There could be a synthesis of the topics in a course at the end of the programme of study which could incorporate the basics of information policy: ethical, legal, professional, economic and political issues.

The workshop wishes to emphasise that it will be necessary to be aware that the topics will have to be adapted to:

1) the local cultural, political and institutional setting of a given country or region;

2) the educational system of the country or region;

3) the requirements of the parent institution;

4) the need for programmes at different levels.

The workshop recognises that the establishment of a common core of management education and training will require further effort to overcome problems, e.g. terminological differences and in re-shaping teaching programmes.

RECOMMENDATIONS

1. That FID/ICA/IFLA intensify efforts to work co-operatively towards the goals set out above, especially through the continuation of the FID/ICA/IFLA Working Group on Education and Training.

2. That the regional and international meetings on further harmonisation of curricula should be actively supported by FID/ICA/IFLA and sponsored by UNESCO.

3. Where individual programmes do not at present include the teaching of management, the topics listed above be adopted. In programmes taking an integrated approach the topics might form the common core for management instruction.

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